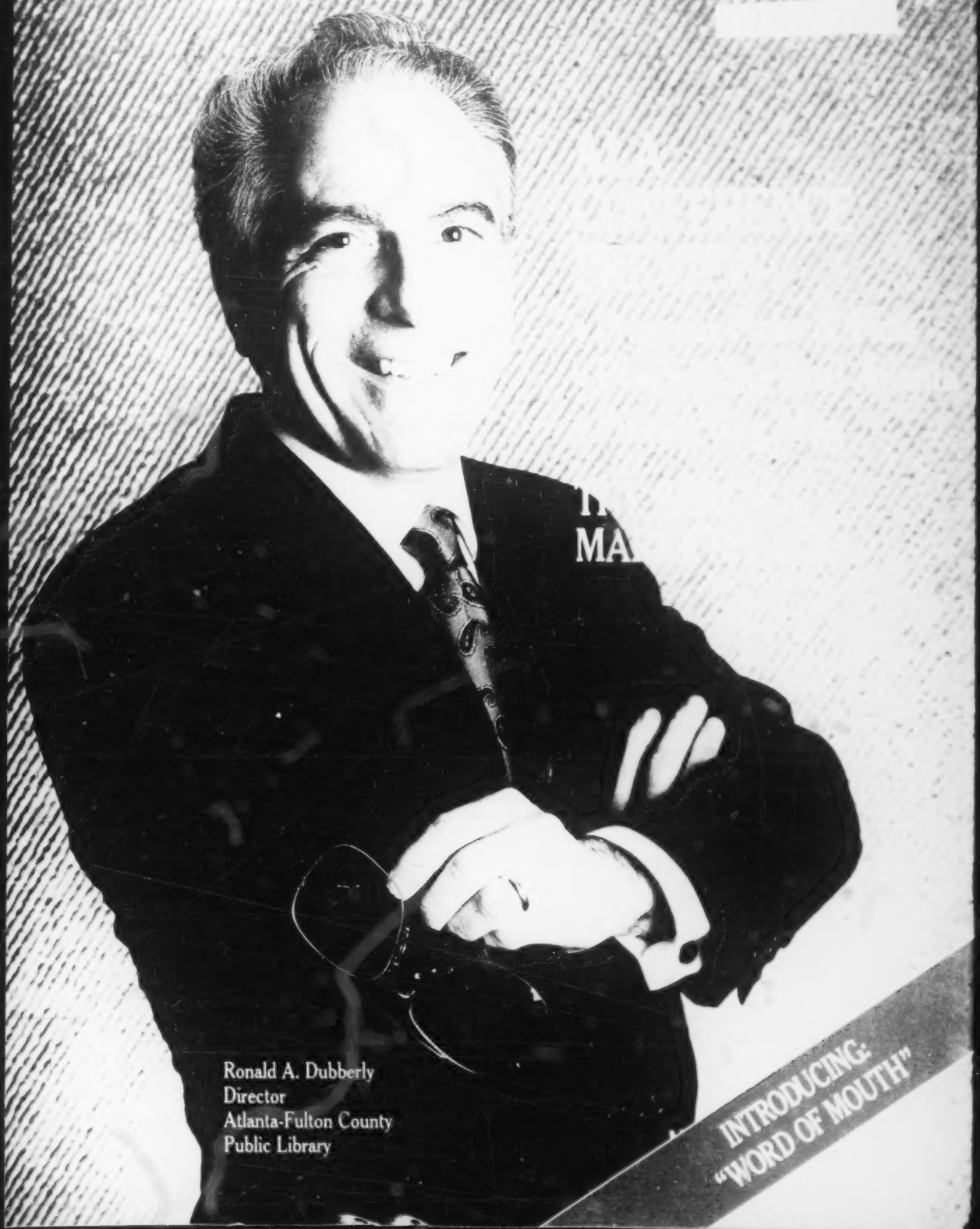
LIBRARY JOURNAL

JUNE 1, 1984



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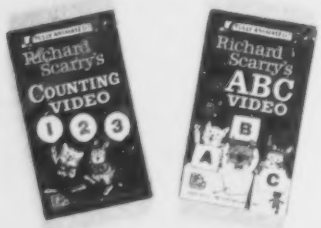

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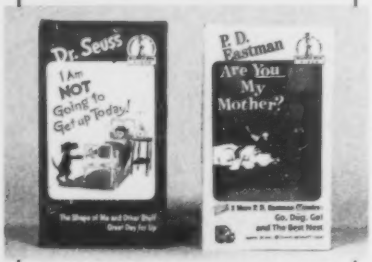

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VOL. 116 No. 10

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Atlanta-Fulton County Public Library's Ron Dubberly views the 110th American Library Association Annual Conference in his city as a challenge and an opportunity for Atlanta librarians (see News, this issue, p. 23).

PHOTOGRAPH BY ROB NELSON

June 1, 1991

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Mary Brenner

The results of the first national survey of librarians, publishers, and vendors offer an interesting perspective on

THE SERIALS MARKETPLACE

By Jane Treadwell & Lee Ketcham

THE UPROAR OVER serials prices in the past few years has obscured other important issues in the marketplace. Questions of how libraries buy, what marketing techniques work, how claims are processed, and the progress of serials automation have been virtually ignored.

To address this, a survey of the serials marketplace in North America was conducted in the summer of 1990 by the American Association of Publishers/Association for Library Collections and Technical Services (AAP/ALCTS) Joint Committee of the American Library Association (ALA). One survey was sent to serials publishers, a second to subscription agents, and a third to libraries, asking questions about their policies and practices and seeking some idea about their attitudes toward the other groups. The results of these surveys, with reactions from panels of experts, will be the subject of an all-day program, "Beyond Price: Serials

Jane Treadwell is Director of Collections and Technical Services, General Libraries, Emory University, Atlanta, and Lee Ketcham is Director of Account Services, Southeastern Region, EBSCO Subscription Services, Birmingham, Alabama. Robert Greene, Science Collection Management Coordinator, General Libraries, Emory University, tabulated and interpreted the statistical data

What Librarians Use To Buy Serials

Survey respondents identified the following as being the most important tools, aids, or factors in selecting serials (listed in descending order of importance):

- Patron requests
- Sample copies
- Abstracts/Indexes
- Inclusion on a recommended list
- Reputation of publisher
- Professional journals
- Reputation of authors/editors
- Library review media
- Promotional brochures
- General trade review media
- Information obtained at library conferences
- Publishers' catalogs
- Information obtained at academic meetings

How Librarians Select Serials Vendors

When a library selects a serials vendor, the following factors were identified by survey respondents as being most important (listed in descending order of importance):

- Effectiveness of resolving claims
- Accuracy of invoices
- Timeliness in processing orders
- Responsiveness of customer service personnel
- Willingness to handle all serial titles unless publisher requires a direct order
- Comprehensiveness of vendor's title file
- Competitiveness of handling charge
- Availability of management reports
- Availability of published catalogs
- Provision of customized budget forecasts

Trends in the 90's," at the ALA Annual Conference in Atlanta on Sunday, June 30, 9:30 a.m.–5:30 p.m.

The library survey

The extensive library survey (51 questions) was sent to every library in the Association of Research Libraries (ARL) and a random sample of public, academic and special libraries—446 in all. The results show that serials continue to be much on the mind of the largest research libraries; the response rate was 56 percent for all libraries and nearly 80 percent for ARL libraries.

Library budget trends

The libraries responding to the survey confirmed the conventional wisdom about library budgets: they're not getting any bigger. Libraries were asked to assess how their budgets might increase or decrease over the next three years in relation to the inflation rate for books and serials. Only ten percent of the respondents expect their budgets to increase above the inflation rate during the next three years. Another 20 percent project budget increases *at* the inflation rate. The majority (62 percent) see their budgets either increasing below the inflation rate or remaining the same. Interestingly, only 5.4 percent of libraries expect budget cuts over the next three years.

When asked about the percentage of the materials budgets currently spent on serials (periodicals/magazines/journals), libraries seem to respond according to type. The majority of ARL libraries spend 50–74 percent of their budgets on serials, academic non-ARL libraries typically budget 25–49 percent, and public libraries allocate no more than 25 percent of their budgets to serials. Questioned concerning a reasonable percentage of the total budget to expend on serials, responses appeared to coincide with practice. Special libraries were the only group for whom theory differed from practice. Although the majority of special libraries saw 42–55 percent as the ideal amount to spend on serials, actual expenditures ranged from ten to 74 percent of the total budget.

Despite the generally gloomy outlooks for library budgets and reports of massive serials cancellations during the past year, in the summer of 1990, libraries on the whole were adding more serials titles than they were cancelling. The exact questions asked were: "During your last fiscal year, how many new orders were placed for serials?" and "How many serials titles were cancelled?" Smaller academic libraries were clustered in the ranges of one to 15 and 16–50 titles added, but cancelled mostly in the range of one to 15 titles. The majority of public libraries added and cancelled between one and 15 titles, with a few more additions than cancellations. Of the ARL libraries, on the other hand, two-thirds reported adding more than 100 titles, while only one-third reported cancelling more than 100 titles.

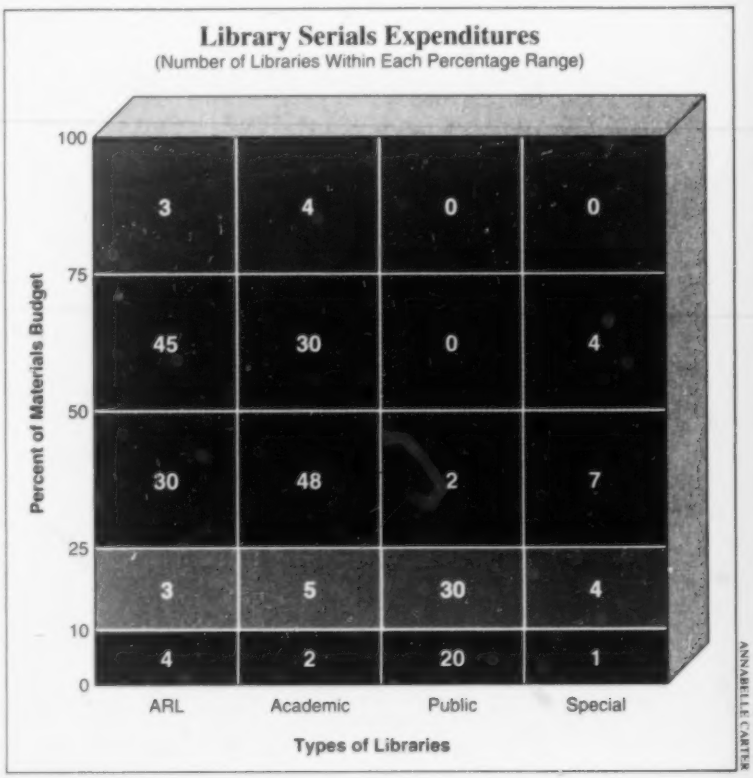
The questions about new orders for serials and serials titles cancelled were not framed in terms of price. Perhaps if we had asked for dollar amounts of new serials subscriptions vs. cancelled titles a different picture would have emerged. Purely on the basis of numbers of titles, however, there appears to be no overall decline in the market for serials among North American libraries.

The extent of resource sharing

These survey results also confirm a trend toward resource sharing. Most of the respondents (86 percent) were members of one or more cooperative organizations for resource sharing, and the use of interlibrary loan (ILL) is on the increase. Nearly three-quarters of the respondents said that the number of ILL requests placed and fulfilled by their institutions had gone up over the past three years. Only 25 percent reported that ILL activity has decreased or remained about the same. To provide an idea of the amount of ILL traffic in journal articles, while 40 percent of libraries said that during the previous year they fulfilled 1000 or fewer requests for journal articles, 28.5 percent fulfilled 5000 or more, an average of 14 articles a day.

Who makes the decisions?

In selection and deselection decisions in libraries, who are the key players? The answer once again seems to vary by type of library. For all except ARL libraries, the director appears to play the dominant role. This is especially true for special libraries that typically have a very small professional staff. In academic non-ARL libraries, the director was seen as the key decisionmaker by a



little over half the respondents, with faculty the next most frequent choice.

In public libraries, the director edged out the head of collection development as the key decisionmaker, but it was only in public libraries that the head of collection development seemed to play much of a role at all. In ARL libraries, our respondents believe that subject specialists are by far the most powerful people in matters of serials selection and cancellation. They received twice as many votes as either the head of collection development or the faculty, who tied for second place. The role of director in making serials selection and deselection decisions is greatly diminished in the larger and more complex world of the ARL library, with only five respondents seeing the director as the key individual.

Fulfillment and distribution

With such a large portion of a library's materials budget allocated to serials, the way subscriptions are handled is of immense concern to librarians. Most libraries place over 75 percent of their orders through vendors. A third of the libraries in the survey work with just one vendor, but almost 30 percent do business with ten or more. Since there are relatively few serials vendors in the world, this means some libraries use nearly all of them.

The survey included several questions about claims, one of the top two considerations for libraries when selecting a vendor. Over half of the libraries responding believe that 75 percent or more of their claims for missed issues are being supplied. However, a disturbing 30 percent of libraries believe that 50 percent or less of their claims are fulfilled. Expectations concerning what vendors and publishers should do to supply claimed issues are extremely high. When asked if vendors should supply missed issues even if the publisher cannot, half of our respondents said that they should.

Automation and new technologies

To what degree have libraries been able to automate serials processes and interface with serials vendors? The number of completed interfaces is modest overall. ARL libraries, not surprisingly, lead nonARL, corporate/special, and public libraries in all areas of implementation. Close to half of all public library respondents indicate no plans to implement automation at this time, except in the area of acquisitions, where 60 percent expect to undertake an automation project within two to five years.

The library survey also included some questions about library use of new electronic formats. The committee was especially interested in CD-ROM because it is most often sold on a subscription basis, becoming in effect a part of the serials budget. Only 13.5 percent of the libraries reported owning no CD-ROM products.

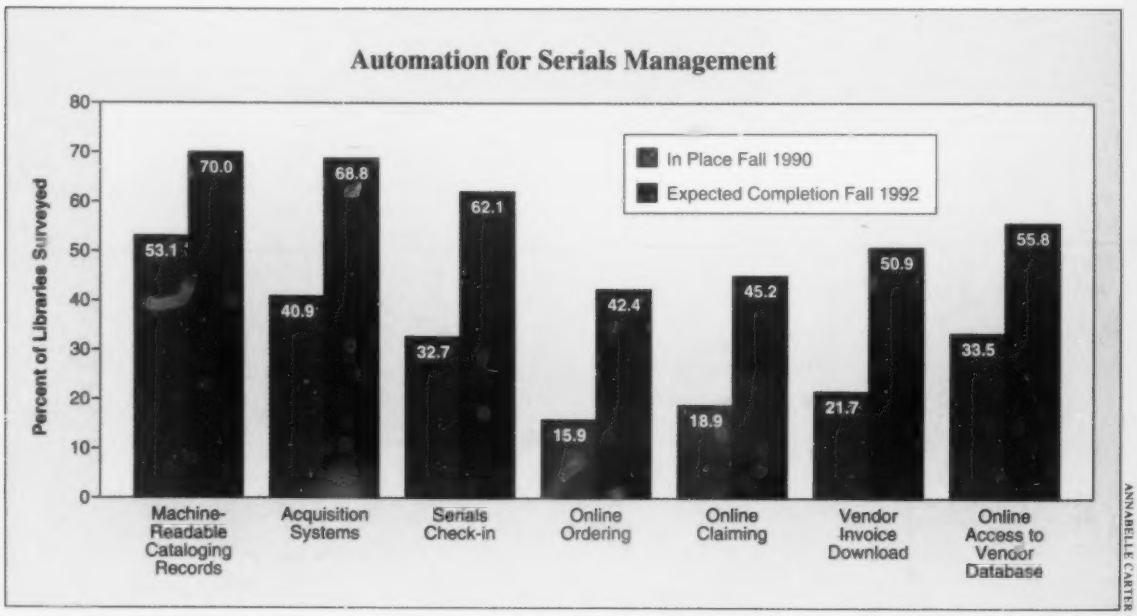
On the other hand, only ten percent own more than 20 CD-ROMs. The majority of libraries fell into the one to ten range, with indexes and abstracts being the most popular type of publication to buy in the CD-ROM format. A surprising number of libraries (37 percent) indicated that they subscribe or plan to subscribe within the next five years to full-text journals online.

The publisher survey

The publisher survey was mailed to 300 publishers selected from the files of a major vendor. The 76 respondents included 11 scientific, technological, and medical (STM) publishers, 25 trade publishers (including consumer/popular presses and other miscellaneous types), 19 association, 12 scholarly, and five university presses. Virtually all are located in North America, the United Kingdom, and Western Europe. Libraries dominate the market for only half of the publishers surveyed, and subscription agencies were involved in a little more than half of the total sales to libraries for this group.

Pricing practices

It is a fact of life that librarians set budgets and order subscriptions



for the upcoming year before most serial price increases are known. The survey results don't seem to offer any hope of relief from this dilemma. The majority of publishers (64 percent) set prices for the upcoming year some time between May and August. They tend to relay the new prices to agents, however, between July and October (71 percent). When asked if it would be possible to supply prices to agents any earlier, 78 percent said "no."

Librarians and publishers have been exchanging volleys for several years on the issue of size vs. price. STM publishers in particular have come under criticism for adding volumes, issues, and pages to a serial title and inevitably swelling the price. The survey reveals that they are not alone in this practice. When questioned about the percentage of titles for which there was a substantial increase in the number of pages, volumes, or issues last year, scholarly and association publishers exhibited growth patterns similar to those of STM publishers.

Publisher services

Publishers were asked how long it takes them to perform certain routine procedures. Some of the answers were surprising in comparison to library perceptions. For example, 70 percent of the respondents indicated that they process new orders in 30 days or less from receipt of order to mailing of first issue; 73 percent can do the same for renewal orders. Twenty-five percent said that they respond to missing-issue claims in one to three days, 22 percent in four to seven days, and another 41 percent in two to four weeks.

In pursuit of the perfect claiming method, we asked publishers to rank various claim delivery methods according to which got the quickest response. FAX and telephone claims appear to hold a significant edge over the U.S. mail. Only a few publishers can receive claims by electronic mail, leaving the question of their effectiveness unresolved by this survey. STM publishers are more likely than other types of publishers to have replacement issues on hand because they tend to print a higher percentage of extra issues.

Many publishers question the value of agents, despite the fact that 62 of the 76 publishers surveyed believe that larger libraries generally prefer to order through a vendor. Only 55 percent, for example, agree that agents lower a publisher's operating costs; 66 percent believe that they should give agents discounts. Nevertheless, 72 percent of all respondents offer discounts to agents.

Publishers' use of new technologies

Many of the benefits of automated serials systems in libraries depend ultimately on the ability of publishers to exchange data in standard formats with libraries either directly or through subscription agencies. What is the status of automation among serials publishers? The survey found that STM and university presses were two to three times more likely than other publishers to be operational or near completion in their ability to accept orders, renewals, and claims electronically. Only two publishers (both STM) are now able to electronically distribute journal dispatch information to agents, and a mere handful in all categories expect to be able to do it in the next two years. In every category of publisher, in fact, the majority of respondents have no future plans to distribute dispatch information electronically.

> The survey revealed that libraries on the whole were adding more serials titles than they were cancelling

We asked publishers about their plans to publish journals online and on CD-ROM. Interestingly, trade publishers are embracing these new technologies more enthusiastically than other publishers. According to the survey results, half of all trade publishers will have electronic journals in publication by 1992, and almost 40 percent will have journals full text on CD-ROM. None of the university presses surveyed plan to publish journals online and only one has plans to publish on CD-ROM. Fifty-eight percent of STM publishers say they have no plans to use either technology for publishing their journals.

The vendor survey

Response to the vendor survey was disappointing, both in terms of number and completeness of returned questionnaires. Forty agencies were included in the survey. Of the ten that responded, three are from the United States, two from the United Kingdom, three from Western Europe, and one each from New Zealand and South Africa. The group included two agencies with annual sales of over $100 million and six with sales under $25 million.

Despite the diversity in size and location, the vendors exhibited common tendencies in many practices. For example, five out of the ten bill with firm prices at the exchange rate on the day of the invoice. Another three bill back if the exchange rate has changed on the date of payment. None of the respondents indicated that they issue credit if the rate changes favorably for the subscriber on the date of payment. Relative to claims, the majority of agencies process them within one to three days, and all but one screen for premature claims. Nine of the vendors will request sample issues from publishers. Seven supply free catalogs listing serial titles for customers.

The unautomated vendor

Perhaps the most interesting trend revealed by the survey was in regard to automation. It appears that vendor interfaces with publishers lag somewhat behind interfaces with libraries. Six out of ten vendors receive claims and orders from libraries online, yet only two agencies are able to pass along the claims to publishers in an online mode, and only three are able to send new orders online to publishers. However, six of the ten vendors surveyed do submit renewal orders on tape to some publishers.

The next step

This survey was the first of its kind in terms of a joint effort by librarians, serials publishers, and subscription agents under the sponsorship of ALA and AAP. The committee hopes that the surveys would spark the process of dialog and collaboration among publishers, subscription agents, and librarians. The day-long program at the ALA conference will offer an opportunity for the three groups to examine the results in greater detail and to plan further projects.

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